



Capstone Asset Management Inc. is a Portfolio Manager, Investment Funds Manager and Exempt Market Dealer serving clients in British Columbia, Alberta, Manitoba, Ontario, Quebec, and Internationally.

Holding to Biblically informed values, we provide discretionary investment management and mandate specific solutions to clients including high net worth individuals and families, institutions, pensions, foundations, family offices, and third- party Portfolio Managers.

*Title:* Research Analyst

*Reporting to:* Chief Investment Officer

*Location:* Langley, BC

#### *Summary of Position:*

Capstone Asset Management seeks a Research Analyst who, as part of the Investment Management Team, will provide fundamental, quantitative and technical research and analysis to assist in managing the nine proprietary pools. Your background in the investment industry, coupled with your technology expertise, will provide the platform for you to further develop our existing technology to enhance our research and portfolio management. Capstone is looking for a self-starter, organized team player who aligns with our philosophical values.

#### *Duties & Responsibilities:*

##### *Research and Analysis*

- As a member of the Investment Management Team, provide analysis of a wide range of potential and current investments including qualitative and quantitative reports, screens, and analytics to support the work of developing stable and profitable portfolios within the company's nine proprietary funds
- Provide risk metrics and analysis of the current pools
- Research and assess new traditional and non-traditional investment opportunities for existing and future pools
- Execute trades as necessary within the Pools

#### *Technical Oversight*

- Development and maintenance of tools that generate robust and accurate reporting on investments, economic data, and our pools
- Automation and preparation of internal and external documents to serve clients and portfolio managers. Work alongside third-party research and operations professionals to define useful workflows
- Support data, research, and pool information needs of the Wealth Management Team
- Freedom to translate or replace VBA applications with Python-based tools and to direct the development of data management and analysis tools with some freedom as to technology choice



*Qualifications, Skills & Experience*

- Experience and/or Advanced Education in fundamental and quantitative research and analysis
- Strong mathematical and statistical background
- Writing, reading, debugging VBA in an MS Office environment and Python 3 in Jupyter environment
- Current skills in Python 3 including data cleaning, filtering, computation, and presentation  
R programming skills are applicable, but our systems are all on Python
- Strong written and verbal communication skills
- Ability to multi-task while remaining organized
- Strong attention to detail
- Willingness to complete industry courses
- Travel may be required

Please forward your resume and cover letter in confidence to [careers@capstoneassets.ca](mailto:careers@capstoneassets.ca)

Capstone Asset Management thanks you for your interest; however, only candidates selected for an interview will be contacted.

